Get to Know Your Customer

Retail Workbook 1

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Learning Objectives for

GET TO KNOW YOUR CUSTOMER

The learning objectives for *Get to Know Your Customer* are listed below. They have been developed to guide the user to the core issues covered in this book.

The objectives of this book are to help the user:

1) Determine customers’ needs by listening and asking questions
2) Give customers an appropriate greeting
3) Refer customers to another department or store
Preface

Welcome to the Crisp Retailing Smarts Series, designed specifically for the retail sales associate. This series is based on skill standards developed by a team of industry practitioners and educators under the leadership of the National Retail Federation, the world’s largest retail association.

The topics covered in these workbooks reflect what employers across the country agree is needed to succeed and grow in a retail career, regardless of the size or nature of the enterprise. The Crisp Retailing Smarts Series sets a new standard for industry-driven learning that leads to productive and measurable results and helps prepare candidates for rewarding careers in retail and other service industries.

The skill standards followed here have been developed for the professional sales associate for several reasons:

- The majority of North American workers initially enter the workforce through a job in the retail industry. Many choose to make retailing a lifelong career, adding new skills as they progress.
- The skills required for success in these entry-level positions are the same skills that will help workers succeed throughout their lives, both personally and professionally, whether in the retail industry or some other field of work or profession.
- In our current service-oriented and global economy, organizations must attract and retain a dedicated, competitive workforce. Skills are a key attribute when selecting these workers.

As you use these materials, take advantage of the exercises and self-assessments that will help you better understand the skills and techniques being explained. Studies show that adults retain new skills more effectively if they apply them immediately to their own experiences. After you have completed the reading and activities in each section, look for opportunities to put the lessons into practice. Then use the Learning Checklist in the back of the book to record your progress and successes.

We are proud to help the retailing industry pioneer the development of skill standards and raise expectations for a committed and competitive workforce. And we are proud that learners like yourself are taking your future into your own hands and mastering the skills that will bring you success and recognition in your chosen profession.

Tracy Mullin
President and CEO
National Retail Federation
Life-Long Benefits of a Career in Retail

Providing personalized customer service is job number one for sales associates. This is true whether you work in a large department store, a Mom and Pop grocery store, a trendy boutique, or the local discount store. Customer service is what makes the difference in whether customers buy tires from you or your competitor, eat at your restaurant or the one across the street, see you for home improvement needs, or order from a catalog. Therefore, the position of sales associate is much more than a “cashier” or a “clerk.”

The retail sales associate is a professional—a person with specialized knowledge, expertise, and “people skills.” The professional sales associate is an expert in customer relations. These experts are in big demand by retailers and through use of their expertise, can turn even an entry-level, routine job into an exciting and rewarding career. And being an expert at customer relations can bring you many other rewards. In the following list, check those which are important to you.

A career in retail has many potential benefits. Check (✓) all of the following that are important to you.

- Opportunity to help people
- Flexible working hours
- Opportunity for promotion
- Employee discounts on purchases
- Ability to relocate and still stay in your profession
- Status as an expert on products and services
- Personal benefits such as health insurance
- On-the-job training that is transferable to other fields
- Ability to choose your work environment
- Paid vacation
- Selling products related to personal interests or hobbies
- Being first to know about new trends and products
- Meeting new people
- Learning about other retail functions such as purchasing, display, and store operations
- On-the-job preparation for starting your own business
You have the potential for all of these benefits and more by becoming an expert in customer relations—and it isn’t hard to do! In fact, you are already on your way because you can use your experience as a shopper to develop your skills at helping other customers. However, knowing what satisfies you as a customer is only the beginning of understanding the individual needs and desires of each customer who enters your store. By the time you have read through this book, practiced some of the suggested exercises, and thought about your own experiences, you will be on your way to professional success.
Be the Store’s Frontline Representative

“Whether you’re selling garden hoses or gowns, it all comes down to customer service. Everyone is looking for a welcoming atmosphere, a knowledgeable answer, a smile.”

–Mark Csordos, C&S Mystery Shoppers
North New Brunswick, New Jersey

The sales associate is the frontline representative of any retail operation. As such, your first and most important role is to create good relationships with customers. These days, with so many choices of retail stores and products, customers want to come to a store in which salespeople make a special effort to make them feel welcome, respected, and well-served. As one consumer trend expert has written, “Perfect packaging, beautiful product shots, cleverness, style over substance, or hype just don’t work anymore.”

Sales associates are key… This is great news for people who pursue a career in retail sales. It means that stores depend on sales associates, not products or gimmicks, to represent a store’s values. And the primary value every good store wants you to communicate is that customers are number one, and that service will be delivered in a personal, one-to-one way. Employers value sales associates who understand and are prepared to give quality customer service.

Are You Prepared to Give Quality Service?

Quality customer service means more than following a set of rules. Giving quality service requires developing certain qualities and skills for working with people, gaining their trust, and meeting their needs.

The following exercise will help you learn more about yourself. It is not a test and you need not share the results with anyone else. Completing this exercise will help you understand how you currently feel about providing customer service. Answer the questions honestly and the results will help you determine where you need to focus your learning efforts in order to be successful as a sales associate.
**ARE YOU PREPARED TO GIVE QUALITY SERVICE?**

Circle the number which most closely reflects where you are on the scale for each question. When you’re done, add up all the circled numbers and write your score in the space provided below.

No one needs to see your score but you—this exercise is to help you focus your learning efforts and develop the attitude needed to be a successful retail sales associate!

<table>
<thead>
<tr>
<th>Statement</th>
<th>10</th>
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<th>4</th>
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<tbody>
<tr>
<td>I control my moods most of the time.</td>
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<td>I have limited control over my moods.</td>
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<td>It is possible for me to be pleasant to people who are indifferent to me.</td>
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<td>I simply can’t be pleasant if people are not nice to me.</td>
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<td>I like most people and enjoy meeting others.</td>
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<td>I have difficulties getting along with others.</td>
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<td>I enjoy being of service to others.</td>
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<tr>
<td>People should help themselves.</td>
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<td>I do not mind apologizing for mistakes even if I did not make them.</td>
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<td>5</td>
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<tr>
<td>Apologizing for a mistake I didn’t make is wrong.</td>
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<tr>
<td>I take pride in my ability to communicate verbally with others.</td>
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<td>5</td>
<td>4</td>
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<tr>
<td>I would rather react with others in writing.</td>
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</table>
### Get to Know Your Customer

**I’m good at remembering names and faces, and make efforts to improve this skill when meeting others.**

10 9 8 7 6 5 4 3 2 1 Why bother remembering a name or face if you will never see that person again?

**Smiling comes naturally to me.**

10 9 8 7 6 5 4 3 2 1 I am more serious by nature.

**I like seeing others enjoying themselves.**

10 9 8 7 6 5 4 3 2 1 I have no motivation to please others, especially those I don’t know.

**I keep myself clean and well groomed.**

10 9 8 7 6 5 4 3 2 1 Being clean and well groomed is not all that important.

Total score: ______________
Understanding Your Self-Assessment

“There are a tremendous number of people who work in a retail setting as their first job. The skills they learn on that first job are skills they’ll have for the rest of their lives.”

–Robert B. Reich, former U.S. Secretary of Labor

If you rated yourself 80 or above, you probably are excellent at helping customers. The information in this book will show you how you can refine your skills at meeting customer needs.

If you rated yourself between 30 and 80, you will greatly benefit by using this book to learn more about customer relations.

If you scored under 30, you may want to consider a retail career path that does not involve a lot of customer service. Large retail organizations employ people in functions that keep the company running smoothly, but don’t require as much interaction with the general public, such as Distribution or Merchandising.

Even if you should decide at some point that you don’t want to work directly with customers on a daily basis, understanding customer service is essential to working well with others. Treating your co-workers like customers will help make you successful in any career you pursue.
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Greet Customers in a Winning Way
Greet Customers in a Winning Way

“Most of us form quick first impressions. We often... decide whether we like people, feel good about them, or want to do business with them in those first few seconds of contact.”

–Ron Willingham, author of “Hey, I’m the Customer”

Before you can build a relationship with a customer, you first have to greet the customer in a way that makes her feel welcome and comfortable doing business with you. Some experts say that a sales associate has about 10 seconds to notice a customer’s arrival and greet her in order to create a good impression. That’s not much time, so you need to make every second count.

1. Acknowledge the customer’s presence
2. Project a professional and friendly image
3. Create an opening for discussion
4. Be reassuring, but not pushy
5. Include the entire shopping party
1. Acknowledge the Customer’s Presence

First of all, don’t make a customer wait too long for your attention. Researchers who study customer behavior have learned that if a customer has waited 30 to 40 seconds to be greeted, she is likely to feel she’s been waiting three or four minutes. Make eye contact as soon as possible. Even if you are helping another customer, you can excuse yourself briefly and tell the new customer you will be with her in a moment. You can also ask a fellow sales associate to help her. With these thoughtful gestures, you will buy a few more minutes of the customer’s patience. Just don’t leave her feeling unnoticed. It will make her believe she’s going to receive poor service—a first impression that’s hard to change.

2. Project a Professional and Friendly Image

Looking professional isn’t just about how you dress. It also has to do with acting in an alert and courteous way. Naturally, you need to choose clothing that fits the dress standards of your store—perhaps business wear for a fine apparel store, or casual wear for a hardware store. However, showing the customer you are sincerely interested in serving him is every bit as important in making a positive connection. And a smile is always a direct way to show you’re interested and friendly—a smile with both your eyes and your mouth!

Try to greet each new customer in a natural, relaxed way. You might begin by saying something about the rainy weather, for example—“I’ll bet you’re glad to be in from the weather!” Or you might notice that the customer has a good sense of humor from a funny comment he makes. You can let him know you appreciate what he just said.
3. Create an Opening for Discussion

Asking “May I help you?” or “Can I help you find anything?” may set you up for a dead-end response from the customer such as “No, thank you,” or “Just looking.” Instead, observe the customer to pick up some clues to start a conversation. Establish a common interest between you and the customer. If the customer tries out a product, watch her reaction and make an appropriate comment.

Customer:  “Um, nice lotion.”

Sales Associate:  “That’s our most popular line; I use the Kiwi version of it myself.”

Or if the customer sits on a mattress to test it and says, “Wow, that’s a good firm mattress,” you might want to respond, “I don’t think there’s anything better than a good night’s sleep on a quality mattress. Squishy mattresses just don’t cut it do they?” You are trying to create an opening with the customer, so you can understand what the customer wants. Once the customer senses that you do understand his interests, he will naturally seek your assistance.
4. Be Reassuring, Not Pushy

What you say and how you say it should be in tune with the customer’s personality and mood. In other words, don’t be too familiar with someone who behaves in a shy or reserved way. And don’t push the humor too far with a more outgoing customer. Be sensitive and think in terms of taking steps toward getting to know someone, rather than achieving an instant friendship. This will make the customer feel comfortable—rather than turning him off with too much attention too soon.

**Tip:** Comments such as “That looks very good on you,” and “This is a very fine value” will be appreciated, but only if you are being honest and sincere.

Show the customer you will assist him in the style he prefers. Sales associates who hover over customers as they look through merchandise can make customers feel suffocated. Instead of giving excessive attention, show your interest in the customer by making a positive remark about the item he is looking at such as: “That’s our top-of-the-line sander you’re looking at.” This more subtle approach accomplishes three important things, all of which help create a positive impression of you and the store:

- You’ve complimented the customer’s taste.
- You’ve assured the customer he’s the expert.
- You’ve showed your own knowledge of purchases that are worthwhile.

If you offer to help the customer and he says, “No, thank you,” back off. You may be sincerely trying to help. But the customer may feel you are being too aggressive. You want to be sure to give the customer breathing room, a chance to look at merchandise in a relaxed way. However, do not disappear from the sales floor. That customer may not want your help right then and there, but may need it in a moment.
5. Include the Entire Shopping Party

What you’ve read so far describes a customer who is shopping alone. Often, you will be dealing with a customer who is with friends, a small child, an older relative, or a mate. An equally important part of making a good impression on the customer is to give good service to those who are with her. This can mean offering a comfortable chair to the other person while you review paper work with the customer. Or you might ask the friend if he would like some complimentary coffee or a magazine or newspaper to read while he waits. A customer with a fussy child might look distressed, and you might ease her stress by making a positive comment about the child or offering a toy to amuse the child while you help the customer. Most of all, be sure to show you care about helping in whatever way you can.

**Tip:** Use good judgment! Your involvement may not be welcomed by the “shopping party” in some cases, such as when a parent is scolding a child or when two shoppers disagree on a purchase.
**OBSERVE EFFECTIVE GREETINGS**

One way to learn about the importance of an effective greeting is to visit a store as a customer. While you’re there, pay attention to how the sales associate greets you and interacts with you.

Record your impressions by answering the questions in the first column. Then write some ideas in the second column about how you would approach this situation if you were the sales associate.

<table>
<thead>
<tr>
<th>What Happened/How Did You Feel?</th>
<th>What Would You Do Differently as a Sales Associate?</th>
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<tbody>
<tr>
<td>How soon after you entered the store did a sales associate make contact with you? __________________</td>
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<tr>
<td>How did the sales associate greet you—what did he or she say?</td>
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<td>__________________________________________________________________</td>
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<tr>
<td>Did the sales associate try to engage you in conversation? ___________</td>
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<tr>
<td>If so, how? __________________________________________________________________</td>
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<td>What, if anything, did the sales associate say to you to compliment your taste or make you feel like the expert? ___________</td>
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<tr>
<td>What Happened/How Did You Feel?</td>
<td>What Would You Do Differently as a Sales Associate?</td>
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<tr>
<td>What, if anything, did the sales associate say to make you feel confident that he or she understood your needs?</td>
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<tr>
<td>Did you feel comfortable with the sales associate’s manner? Why or why not?</td>
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</table>
Create Customer Loyalty

"Ask yourself what you can do to earn the loyalty of your consumers. And, then, deliver. You’ll have earned their allegiance for life."

—Faith Popcorn, trend analyst
“The Popcorn Report”

Your friendly greeting is just the first step in creating a good relationship with a customer. To bring that customer back again and again, you will need to show the customer that your whole job is to serve her. Let’s say you helped her locate the perfect toaster (she wanted it to have slots wide enough to toast English muffins or bagels). You also explained what a good warranty it has (two years, not the usual six months). And you reassured her that this has been a reliable and popular product.

Building trust… The toaster customer is learning to trust you because you have responded to her needs and given her good information, first steps in building her trust. By listening carefully, you have also picked up hints about how you might help her in the future (perhaps she mentioned she is changing her decor, which influenced her color choice in the toaster). As you complete this transaction, you will want to tell her that you’ve enjoyed helping her and would be honored to help her again. If you have a business card, you can offer that to her so she can ask for you by name next time (or you can write your name on the sales slip).

Over time, customers who appreciate your good service will return to you for help in purchasing new items. They may also recommend you and your store to friends and business associates. And they may feel so confident that you understand their tastes and preferences that they will depend on you to act as a personal shopper for them. Now that they know and trust you, they will return the respect you have given them.

Tip: 45 percent of customers say they are likely to spend more if the sales associate is helpful, according to market research. On the other hand, 18 percent of customers will walk out of a store if they don’t like the attitude of the sales associate.

By this point you can see the power and importance of your work in building customer relations. In the short term, your employer expects you to achieve adequate sales each day. But your employer’s first goal is to have loyal customers who return to the store again and again because of the good service they receive.
The true rewards... Of course, it is good business to treat customers well. They’re more likely to come back for additional purchases. Beyond that, you will achieve personal satisfaction in knowing you’ve been helpful. Everyone feels rewarded—the store, the customer, and you—when the customer has pleasant memories of her experience long after you complete the sale. You will have your own pleasant memories of having successfully begun a new customer relationship with someone who feels you are a helpful sales associate and a real person.
Meet Your Customers’ Needs

Retail Workbook 2

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Learning Objectives for

MEET YOUR CUSTOMERS’ NEEDS

The learning objectives for Meet Your Customers’ Needs are listed below. They have been developed to guide the user to the core issues covered in this book.

The objectives of this book are to help the user:

1) Make the shopping experience enjoyable for customers
2) Inform the customer of additional services
3) Follow through on commitments made to customers
4) Respond to personal needs of shoppers
5) Balance responsive phone service with in-store service
6) Complete special orders
Beyond Products: Today’s Customers Expect More

Success in retailing has always been based on having the right product in the right place at the right time. And advances in technology have enabled resourceful entrepreneurs and forward-thinking businesses to produce and provide new products with incredible efficiency. Today, consumers can obtain almost everything they need and want without leaving the comfort of their homes. People can order groceries over the phone and have them delivered. They can have tires and windshields replaced without pulling their cars out of the driveway. Avid readers may order books via the Internet and have them delivered to their doorstep the next day.

Instead of creating more leisure time, the “conveniences” of modern electronics seem to only raise expectations for individual productivity. Weekly deadlines have been compressed to a daily rush for the overnight express pickup. And that daily stress is now multiplied many times over during the course of an eight-hour shift by demands for instant information, via fax or e-mail. As people’s lives become more and more stressful, two divergent things happen on the retail front. Customers may choose to avoid checkout lines, parking hassles and interaction with less-than-efficient sales associates by turning to catalog, phone or electronic shopping. Or, they become more particular about where they spend what little time they have shopping. These people only go where they know they will receive the best service and the little extras that can turn basic errands into a source of entertainment and pleasure.

As a professional sales associate, you have the power to influence which option customers choose. By providing personalized customer service and an enjoyable shopping experience, you will make people want to get out of their homes, park their cars, hang up the phone, and come into your store.
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Build a Continuing Relationship

Retail Workbook 3

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Learning Objectives for 

BUILD A CONTINUING RELATIONSHIP

The learning objectives for *Build a Continuing Relationship* are listed below. They have been developed to guide the user to the core issues covered in this book.

The objectives of this book are to help the user:

1) Honor manufacturers’ warranties
2) Adhere to the company’s return policy
3) Handle customer complaints
Earning Customers’ Trust

Personalized customer service begins with greeting customers and getting to know more about them and their needs. It also means making the shopping experience enjoyable by being attentive to their personal needs and offering “service extras.” For a truly rewarding career as a professional sales associate, you will want to build long-lasting customer relationships. This kind of customer loyalty is created when customers seek you out personally because they trust you to stand behind the products you sell and to continue to provide excellent service long after the transaction is completed.

You can begin to build that trust before customers leave the store with their new purchases, by making sure they understand product warranties and your store’s return policy. Their confidence in you will grow if you handle any complaints as graciously as you do the initial sale. The relationship will be cemented as you follow up on sales and make sure customers are happy with the products and services you have provided.
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Learning Objectives for

GO THE EXTRA MILE

The learning objectives for *Go the Extra Mile* are listed below. They have been developed to guide the user to the core issues covered in this book.

The objectives of this book are to help the user:

1) Maintain key information on customers
2) Conduct customer follow-up
3) Provide the customer with a personalized business card
4) Schedule personal appointments with shoppers; select merchandise in advance
Add the Finishing Touches to Your Customer Service

Whether you are just preparing for your first job in retail or you are a seasoned sales associate, there are always additional skills to discover and new techniques to practice. A few of the more advanced customer service skills have been collected in this workbook to get you started on your journey to the next level in your profession.

If you have shopped in stores that practice any of these techniques, you are already familiar with the impact they can have on customers. When a sales associate calls you to make sure you are satisfied with your purchase, it makes you feel important. When you receive a handwritten note thanking you for your business, you know that store appreciates you.

When a sales associate hands you a business card and encourages you to return, you realize someone is always there to help you. When you return to a store and the associate remembers your name, you know you will receive personal attention once again. This is the kind of shopping experience we’d all like to have, especially when we’re pressed for time, not finding the items we need, or simply looking for the personalized customer service that makes shopping more enjoyable.
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Learning Objectives for

EXPLAINING FEATURES AND BENEFITS

The learning objectives for *Explaining Features and Benefits* are listed below. They have been developed to guide the user to the core issues covered in this book.

The objectives of this book are to help the user:

1) Listen and ask open-ended questions
2) Acquire and apply product knowledge
3) Request product feedback from the customer
4) Handle customer objections
5) Verify that the product is appropriate for the customer
6) Offer alternative sales options
7) Test products to be displayed
Customers come to your store for a reason. Naturally, you hope that most come with the intent to buy something, either for themselves or for someone else as a gift. Sometimes their purchase is simple or urgent, such as the convenience-store customer who ran out of milk at breakfast. At other times, customers shop more leisurely, taking the time to consider several options until they find the item that is just right for them.

Some people shop for entertainment, simply looking around to see what’s new. Browsers are important customers, too. Even if a browser doesn’t buy today, she may come back later if she likes what she sees and the way she is treated.

Sometimes customers know exactly what they want, right down to the brand name, model, or style. This is usually the case for items that are purchased over and over, such as groceries or other basics. Everyone has their favorite household cleaners, frozen foods, and breakfast cereals!

Customers who know exactly what they want are easy to satisfy. You simply direct them to the product they’re looking for and cheerfully transact the sale. But not all customer interactions are so simple. Some customers want to buy a certain item, but are unsure about brand, style, or color. They need you to help them make their decision by providing information and guidance.

Customers may need your help when:

- They are buying a product for the first time
- They do not purchase the product often
- The item includes use, application, or assembly instructions
- The product has changed and they need updating on the latest features
As a professional sales associate, you can help customers make buying decisions they will be happy with by focusing on each customer individually. Once you understand the customer’s needs, you can explain how the features of the products you sell will meet those needs and benefit the customer. You’ll need to master several simple skills in order to do this. You need to:

- **Understand the features of the products you sell**
- **Ask open-ended questions and listen carefully to your customers about their needs**
- **Describe the benefits of each potential purchase**

Explaining product features is what this book is all about. By completing the exercises, you will see how explaining product features can generate sales and ensure that your customers will keep coming back!

Just as you must tell customers why a product is just right for them, you also owe it to your customers to tell them when products are not for them. For instance, you shouldn’t sell a first-time computer user sophisticated software with capabilities that the customer might never use. The customer will appreciate your honesty and will probably recommend you to friends and family.
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Learning Objectives for

BUILDING THE SALE

The learning objectives for *Building the Sale* are listed below. They have been developed to guide the user to the core issues covered in this book.

The objectives of this book are to help the user:

1) Motivate the customer to return for future purchases
2) Sell the customer additional or related merchandise
3) Review current advertising and promotions
4) Handle customer returns; transform them into new sales
5) Initiate/create special promotions
6) Convert phone calls into sales
7) Encourage customers to open credit accounts and purchase gift certificates
Building the Sale,
Building Customer Loyalty

Professional sales associates do so much more than merely point the customer toward the items they request and take payment for the items they purchase. A professional sales associate gives each customer personalized service in a way that makes the customer feel unique and special. This creates customer loyalty and keeps them coming back for all their shopping needs.

A professional sales associate can also create customer loyalty by helping shoppers recognize how they might benefit from items they did not initially have in mind when they started shopping. You can do this by paying close attention to what your customers are looking for, suggesting ways to enhance their purchases, alerting them to special opportunities to save money, or helping them take advantage of follow-on services.

This is called building the sale. It means making sure you have fully explored your customer’s needs, that you are aware of additional opportunities to meet those needs, and that you keep in contact with customers so you can meet their future needs. This workbook will help you make every customer contact count so you can successfully build the sale.
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Learning Objectives for

CLOSING THE SALE

The learning objectives for Closing the Sale are listed below. They have been developed to guide the user to the core issues covered in this book.

The objectives of this book are to help the user:

1) Sell the customer additional or related merchandise
2) Assist the customer in making purchase decisions
3) Inform the customer of the store’s exchange/return policy
Closing: The Most Important Part of the Sale!

“Not trying to sell something to someone who needs it is just as bad as trying to sell something to someone who does not need it.”

–Andrew Wileman & Michael Jary, Retail Power Plays

As you know, it is very important to you and the company you work for that people actually decide to buy your products and services—you can’t stay in business and get paid if people don’t buy what you are selling! The part of the sale in which customers commit to buying is known as the “close.” Closing the sale is also a very important part of the shopping experience for customers; closing the sale allows them to take home their new possessions.

Making it easy… There are different ways that you, as a professional sales associate, can make sure the closing happens and customers get what they want and need. In full-service stores, such as department and specialty stores, sales associates play a key role in helping customers make their purchase decisions. Customers expect you to be knowledgeable and helpful, answer questions, make suggestions, look for alternatives, and take care of any follow-up tasks.

Making it quick… In self-service stores, such as discount, drug, and food stores, customers will approach the sales associate only to pay for an item or when there is a question about specific merchandise. Customers expect correct information and quick and efficient service when paying for their selections. Today, shoppers are often rushed for time, and the last thing they want to do is wait for an answer to a simple question or to stand in a long line to make a purchase.

So how you close the sale will depend on the type of retail situation you are working in and on the needs of your customers. But in all situations, you want to be sure that customers feel good about the experience and that their last impression of the store is a positive one.
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Completing the Sales Transaction

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Learning Objectives for

COMPLETING THE SALES TRANSACTION

The learning objectives for Completing the Sales Transaction are listed below. They have been developed to guide the user to the core issues covered in this book.

The objectives of this book are to help the user:

1) Handle transactions and related paperwork
2) Open, maintain, and close the cash register
3) Package merchandise appropriately
4) Assure that shipping/mailing/deliveries are handled properly
The Finishing Touches

Even after you successfully close a sale, there are still things to be done. Completing the transaction is more than simply handing the customer a receipt and saying, “Have a nice day!” Both your customer and your employer have specific needs and expectations that you must meet if you are to become a professional sales associate.

Each time you complete a transaction, you have several equally important responsibilities. Taking care of customer payment; completing necessary paperwork; keeping accurate records; and coordinating packing, shipping, and delivery of purchases to the customer are all skills that you will need to have. Dealing with these situations with accuracy, efficiency, and enthusiasm will guarantee an employer’s faith in your ability and hopefully win the customer’s satisfaction and continued patronage!
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